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UNITED NATIONS ENVIRONMENT PROGRAMME



EVALUATION OF ALTERNATIVES
IN TOURISTIC DEVELOPMENT OF BELIZE



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BELIZE: SECTORAL DEVELOPMENT PLAN: TOURISM

1. Introduction and Background

- 1.1 The terms of reference for the consultant preparing the Tourism Sector Plan for Belize are reproduced at Appendix I. This section deals with item 1 of those terms of reference namely: Evaluation of Alternatives of Touristic Development of Belize, starting with propositions already presented to the Government.
- 1.2 During discussions with the Ministers of Tourism and Economic Development of Belize as well as with officials of the Office of Economic Development, it was agreed that for a number of reasons, the more useful approach in respect of the tourism sectoral plan would be a two dimensional one which involves :
- (i) the preparation of a five year (medium range) planning framework - in essence an indicative plan providing general guidelines for the development of tourism and;
 - (ii) a sectoral strategy containing a set of logic steps for action in the immediate term - this to be used by the Government to provide the necessary stimulus for action beginning almost immediately.
- 1.3 The logic of this approach recommends itself. To attempt more than an indicative plan for the next five years would not make much sense given the existing circumstances which include :

- (i) the current absence of clear cut government policy in relation to what Belize wants from tourism;
- (ii) the ever-changing influences and characteristics of world tourism which requires constant monitoring of and flexibility with respect to, market place developments;
- (iii) the tremendous uncertainty surrounding resource availability vis a vis tourism development - resources both financial and technical and;
- (iv) infrastructural uncertainties e.g. accommodation, air transport, ground operations and so on.

1.4 In addition to these, the present Government's approach i.e. to publicly declare tourism as a high priority industry is not nearly enough, in the face of a situation in which the previous Government virtually frowned on the industry and from all accounts, did its utmost to discourage its development. Tourism is a service or people industry, requiring the overall involvement of the population at large. An entire psyche - a modification to prevailing attitudes amongst Government officials, bankers, front line people in hotels and other tourism establishments, school children, taxi drivers and so on - has to be changed, if tourism is to play the desired role in the economic development of Belize. As is the case all over the Caribbean, Africa and the Pacific, the Government has to take the lead role. There simply is no evidence that a variant to this will work - even one which has secured the good blessings and firm promises of a vibrant private sector. The Government must take

the lead in a manner realistic with its resources and capabilities. Which brings us to the second dimension of the approach adopted herein.

- 1.5 The sectoral strategy provides the Government with a recommended course of action for galvanizing the various actors and agents involved in tourism. It is based on realism: what is achievable within a reasonable timeframe given the severe resource constraints faced by the Government. The emphasis throughout is on smallness - action to be undertaken in manageable proportions, sometimes in sequence and at other times on a parallel basis. Each action or activity is intended to address critical issues and/or produce results within the near-term time-horizon. At the same time, each activity is intended to be consistent with, or supportive of, the longer term indicative plan.
- 1.6 TOURISM will not JUST HAPPEN. Once the decision to pursue tourism as meaningful economic activity is taken (as is the case with Belize) then the Government needs to tangibly demonstrate a commitment to making the industry an economically viable one. This requires taking hard decisions in respect of allocating (albeit scarce) resources. Yet, with very careful thinking and planning, small budgets can be put to very good use in the development and marketing of a viable tourism product and in the maximization of the economic contribution of tourism. The competition for shares in the world tourist dollar is increasing every day. In the Caribbean alone, the Bahamas, Barbados and Jamaica spend a combined US\$40 million or so annually to just market and promote their tourism product. Ireland spends US\$4 million. The task for Belize will be difficult one.

2. The Belize Tourism Product : A basis for tourism development

2.1 The tourism product is a set of experiences. It includes travel and accommodation, activities which take place in a specific environment (social, cultural, physical) and it requires that all relevant facilities and services are provided. The holiday product will consist of six components :

- (i) Environment - physical, social, cultural
- (ii) Activities - things which can be done by the visitor
- (iii) Travel - to/from/within the destination
- (iv) Accommodation - where the visitor stays
- (v) Services - information and other needs
- (vi) Infrastructure - basics such as roads, telephones and so on.

This definition sees the product as a total experience. A failure or weakness in any of the components will diminish the total experience.

2.2 Some assessment of the Belize tourism product has already taken place. The latest of these include one by Steingenberger Consulting and another (earlier) one by the Pool of Marketing Specialists at the Caribbean Tourism Research and Development Centre (CTRC). In fact, both efforts were undertaken under the auspices of the European Marketing Project executed by CTRC and CTA. These assessments form the basis of the analysis here concerning the Belize tourism product and the concomitant proposals for its sectoral development.

2.3 The most striking tourism potential exists in the following areas :

- (i) the coastal and marine areas
- (ii) the forest, mountain and wildlife areas and;
- (iii) the ethnic and cultural areas with some emphasis on Mayan archaeological sites and on cultural activities.

Some of these can be made more productive in the very short term, others will require development and/or enhancement over the much longer term. Each of these is dealt with in turn below.

2.4 The coastal and marine areas contain great potential for diving and snorkeling, deep sea fishing, sailing and cruising and activity involving marine wildlife. In addition traditional sandy beach activities can be enjoyed at Placentia on the coastline and on the Cayes at Ambergris, Caye Caulker and Caye Chapel to mention a few. Since these areas will be dealt with in considerable detail in a report soon to be given to the Government, no time will be wasted in duplicating those details in this document. Suffice to say that in the opinion of marine activities experts, Belize abounds in potential. These experts have for example described the Blue Hole which was investigated by Jacques Cousteau in 1972 as the world's unique dive site. This immense spherical underwater hole formed by the collapse of a dry subterranean cave is felt to be sufficiently unique to attract divers to Belize. And, it has been said that only in Belize would divers find startlingly clear blue waters inside a massive rock-walled sphere containing long stalagmites that elsewhere are found only in land-based caverns. The attributes of the Belize diving potential are described in vivid detail in a report done by diver Nicholas Weir for CTCRC in June 1985.

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2.5 The fishing, sailing and cruising potential of Belize has also received rave reviews. The PMS group has pointed to the big gamefish which migrate through Belizean waters twice a year and the attraction this holds for American sportsmen, as has been successfully exploited by the Cayman Islands and to a lesser extent, Barbados. As for cruising and sailing, the coastal waters of Belize are thought to be superb, given the combination of trade winds, clear waters and choice of interesting anchorages (the Steingenberger report will provide greater detail concerning these attributes).

2.6 The forest, mountain and wildlife areas are thought to represent substantial opportunities for tourism. Although the range and content of these resources are yet to be catalogued, it is clear that potential exists in the following:

- (i) animal wildlife - a wide range with species from both North and South America;
- (ii) birdlife - more than 500 species identified;
- (iii) butterflies - an apparent wide range of interesting species which could be the subject of close study;
- (iv) flora/trees - over 4,000 species including a wide range of orchids, tropical rain forest;
- (v) scenic areas - with great opportunities for canoeing and fishing;
- (vi) caves - some of the largest and most interesting in the world are allegedly to be found in the southern mountains of Belize.

2.7 The Mayan sites and other historical and cultural assets represents the third area of tourism potential in Belize. Mayan civilization flourished in Belize for a long period and some 400 sites of Mayan activities have been identified to date although only five of those which have been partially cleared and restored are open to the public. In addition to these Mayan sites, the ethnic mixture of Belize provides interest and variability across the country and carries with it the potential for development of a variety of cultural entertainment and handicraft. The main art forms - Creole, Mestizo, Mayan, Ketchi, Garifuna and East Indian, each subscribes a uniqueness of culture to Belize and can successfully be developed into a cultural experience for visitors to the country.

2.8 The challenge therefore is for the development of tourism in Belize, using as the basis the three high potential tourism assets described above and formulating these into a cohesive, identifiable product called the Belize tourism product. The elements of a strategy which follow are aimed at developing these targets of opportunity to the maximum potential possible, given the various constraints, and in a manner which sets Belize apart from the competition. The stratagem therefore envisages :

- (i) the coastal and marine areas
- (ii) the forests, mountains and wildlife areas and
- (iii) the Mayan sites and other historical and cultural areas.

Suggestions are presented for both immediate and longer term action.

The Tourism Development Strategy

3. Action over the Immediate to Short Term

3.1 In this section of the document, the proposals for action in the immediate to short term are presented. However, before actually getting to the proposals, it is useful to consider the institutional framework and issues central to successful development of tourism in Belize.

3.2 Several critical areas need to be addressed. These include

- (i) development /enhancement of the tourism product (experience);
- (ii) marketing and promotion of the product;
- (iii) training and human resource development and;
- (iv) development and maximization of inter-sectoral linkages e.g. agriculture, handicraft and so on.

In addition, a fifth and perhaps the most crucial issue is "What does the Government want from tourism?" The draft macroeconomic plan presently being prepared is, so far, silent on the specific economic role desired or intended for tourism. To the extent that clarity with respect to the expectations of the Government vis-a-vis tourism makes planning in this sector easier, it should be recognized that there may subsequently be need to revise or modify action recommended i.e. at the time that these expectations are crystallized. As such, given that planning should not and must not take place in watertight compartments, there will be need for adjustments as information and results become available. The fundamental approach throughout should be an attempt to match resources with what customers and potential customers indicate they want and to limit the field by concentrating on strengths and segmenting ^{of} markets.

3.3 In Belize, the Government has stated that tourism is the number two (2) development priority. This statement, though useful, provides little direction in terms of specificity, its ability to be quantified and its capacity for measurement. Given this and the silence in the macro plan alluded to at paragraph 3.2, the interpretation is subject to considerable second guessing. Nevertheless, based on conversations with Government officials, some notion of what is intended is offered. Without is, (this notion) suggesting a framework for planning would make little, if any, sense.

3.4 The assumption is that the Government of Belize has the following objectives in mind for (export) tourism:

- (i) the achievement of maximum revenue per head from visitors;
- (ii) an increase in the actual number of visitors to Belize having regard to the need to preserve the existing social and cultural fabric of the people of Belize, and;
- (iii) the maximization of the net contribution of tourism to the balance-of-payments of Belize.

The short term strategy and subsequent operational framework which follow are designed to facilitate the achievement of these objectives.

NEAR-TERM STRATEGY (Phase I)

Enabling Institutional Arrangements

3.5 The Government, in its lead role, should undertake the

following initial tasks:

- (i) Objectives - Announce the objectives presented at paragraph 3.4 or some variant thereto, as necessary. This would provide all of the actors/agents involved in tourism with a common set of objectives on which to focus and therefore increase the prospects for coordinated, synergized activities in respect of those objectives.
- (ii) Organization - Change the Governmental tourism operating framework. At present, there is a Minister, a Permanent Secretary, a Tourist Board (with public and private sector members) and a staff at the Board - in other words, a hopelessly inadequate situation for an industry assigned such hi-level priority. The changes or activities recommended are as follows:
 - (a) Appointment of a tourism adviser for two-three years reporting directly to the Minister with responsibility for implementing the tourism plan. CFTC should be approached and requested to fund an experienced Caribbean national for this appointment;
 - (b) Appointment of a director of tourism designate for Belize - a Belizean national to understudy the tourism adviser;
- (c) Staffing of the Ministry with, as a minimum
 - a research and planning officer (economics, hotels, standards etc.)
 - a statistician (arrivals, bed nights, revenue per head etc.)
 - a marketing officer (market analysis, promotional literature, exhibitions etc.)

These are vital functions necessary for the formulation of tourism policy and decision making in respect of planning, marketing, facilitation and so on. The Minister of Tourism needs to keep his pulse on developments which are constantly occurring in the marketplace and to provide leadership and action as the need arises. The tourism adviser would be responsible, in the initial phase, for overseeing the training and development of the Ministry's staff and for guiding the Minister in respect of development of the tourism product. These functions should subsequently pass to the director of tourism as head of the tourism authority.

- 3.6 In making the organizational change at 3.5(d), some thought has to obviously be given to the existing arrangements. The Tourist Board should remain in place and continue to be advisory. The staff of the Board could possibly, with some additional training, form the core staff of the Ministry. In other countries where a full-fledged Board of Tourism exists, e.g. Ireland, that Board is an economic entity - purely, simply and categorically. For Belize though - the following seems adequate :

- (i) the establishment of a unit in the Ministry of Tourism as described above (tourism adviser, director of tourism designate, and one officer each to function in planning and research, statistics and marketing and promotion respectively) to be the tourism authority;
- (ii) maintenance of an office or outlet in Belize City to serve strictly and only as a visitor information bureau (this could also be undertaken at the airport);

- (iii) retention of the existing Tourist Board to advise the Government in general tourism policy areas.

In this scenario, the economic entity for tourism would be the Export and Investment Promotion Unit which would be responsible for the economic development of the tourism sector within, of course, the general macro economic framework as designed and implemented through the Office of Economic Development. Obviously, very close coordination will be required among these three entities tourism, investment and economic development.

- 3.7 One final word. The responsibility for collecting the room taxes from hotels should once and for all be removed from any of the tourism entities and placed squarely in the hands of the Ministry of Finance.

NEAR TERM STRATEGY (Phase II)

- 3.8 Having instituted the enabling institutional arrangements, the second phase of activities in the near-term strategy can be embarked upon. Training of the staff of the Ministry should be an on-going exercise in this phase and indeed beyond and is therefore not specifically singled out as a separate activity.

Development/Enhancement of the tourism produce or experience

- 3.9 For the immediate term, the objective would be to enhance the tourism product within the previously noted budgetary constraints i.e. increase the total number of visitors and revenue per head from visitors through simple inexpensive and highly selective actions. This means, in a sense, working largely with the existing product offer. The actions recommended here are as follows:

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- (a) the accommodation facilities, particularly those offered by the small Belizean operators on, for example, Ambergris Caye, should be upgraded;
- (b) a scuba diving standards manual should be prepared in simple language for use by even the most basic dive operators;
- (c) the Mayan sites at Altun Ha and Xunantunich should be adequately signposted with descriptive information on those sites; descriptive "take away" literature should be made available for visitors to individual sites; the site centres should be equipped with simple rest facilities e.g. toilets should be added to what presently exists;
- (d) the few operators offering in-land expeditions should be encouraged to develop simple but creative "packages" e.g. canoeing into the hinterland combined with a horseback trek to caves and so on;
- (e) one or two specific hiking trails should be struck to specific sites of interest.

3.10 The machinery for implementing these suggestions is rather simple. The upgrading of accommodation facilities would involve getting the Office of Economic Development and the Development Finance Corporation to make specific, low-cost allocations to Belizean (Nationals) operators to improve/upgrade existing facilities. Hand in hand with this should go a short course through the Caribbean Hotel Association in financial and property management followed by a one or two week seminar (funded by USAID) by the Caribbean Hotel Training Institute or the Barbados Hotel School, for hotel

workers in key centres e.g. Belize City and San Pedro. While this is taking place, the CTRC should be asked to assist in establishing a hotel grading system and the core staff of the Ministry (already appointed) trained in its application.

- 3.11 The PMS group at CTRC has already developed a scuba diving standards manual and should be approached for its application to Belize. Specific follow-through in terms of its use should then be undertaken since, its usefulness is realized really as a marketing tool.
- 3.12 Signposting at the Mayan ruins identified should be undertaken by the Department of Archaeology. The British Army has already donated some signposts and may be willing to assist in actually preparing and placing the signposts (in a creative manner and with the information provided by the Department). The army corps of engineers might also be interested in cleaning some of the sites (Xunantunich requires a lot of work) and in establishing proper restroom facilities.
- 3.13 The U.S. Park Service recently provided assistance to Grenada in the restoration of its Grand Etang Park and might be willing to assist in the establishment of one or two hiking trails - if only in their identification. Also, the "expeditions activities" need to be formally and systematically examined, in the first instance, to see how they might be offered as an attractive, creative package. This should be undertaken by the Tourism Adviser, based on marketplace information (assumed to be) already in his or her possession.

Marketing and Promoting the Product

3.14 Having undertaken the product improvement activities above, Belize should then set about promoting and marketing the product, within, again, the budgetary constraints. These constraints call for highly selective targeting of expenditure. Given also that no money currently exists for undertaking market research germane to Belize and that in any case, the present level of accommodation limits the country's "carrying" capacity, the task is somewhat simplified in the short term.

3.15 The following approach is recommended :

- (a) The tourism adviser and the marketing officer should establish direct links with the umbrella marketing organization - the Caribbean Tourism Association (CTA) - to secure its support and guidance over the years ahead;
- (b) With the help of CTA, one or two worthy tour operators should be identified and invited to Belize to explore the potential for marketing package tours to the country;
- (c) The recent literature/market research describing the growth potential of the 13 Western states in the United States should be carefully reviewed and if possible discussions with people from the likes of Sunset Magazine held (these people have often expressed a willingness to assist Caribbean countries and they are a useful, though secondary source, of good information which would otherwise be unaffordable to Belize);

- (d) The literature concerning successful development of outdoor "expedition-type" vacations (and at great cost) in Hawaii should be reviewed and analyzed - sources include 1985 editions of Signature magazine;
- (e) The European Office of CTA should be requested to field a photo journalist mission to Belize under the regional marketing programme to prepare a color slide presentation on Belize for the marketing library of Belize;
- (f) The EEC should be asked to set aside a modest allocation for the printing of promotional materials e.g. brochures for travel agents and so on out of the Lome III National Indicative Programme.
- (g) Acting with the guidance of CTA, Belize should participate in one or two highly targeted trade fairs - perhaps the World Travel Market in London (December), the ITB in Berlin (March) or one or two chapter fairs in North America;
- (h) Again with CTA's assistance, one or two Public Relations firms, strategically positioned in the North American marketplace, should be approached and asked to submit proposals for representing Belize in the market place.

3.16 As will be noticed, a specific marketing and promotion plan has not been recommended. This would be inappropriate given that it needs to be preceded by good, sound homework. The task is not a difficult one, but needs to be iterative.

The research and marketing officers need to bear in mind the short term time horizons, act quickly and use existing mechanisms creatively to obtain and assess information. Rather costly mistakes can be made in attempting to enter the marketplace to promote the product, cold. Especially important will be the need to :

- (i) review the literature, especially the market intelligence and what the competition (Hawaii, Mexico) is offering and at what price;
- (ii) determine via the tour operators what can be sold and to whom at what price;
- (iii) determine, in conjunction with CTA (of which Belize is a member) what should be done tactically in the marketplace;
- (iv) obtain competitive quotes from different suppliers of promotional material, etc.;
- (v) develop and implement the short term marketing plan based largely on (i) to (iv) and of course the availability of funds through the EEC.

Training and Human Resource Development

- 3.17 Simultaneous with the commencement of the product development and marketing initiatives should commence a modest (in the first instance) training programme. The training should be pursued at two levels - tourism organisational and management and skills training.

3.18 The organisational and management elements should, as was pointed out earlier, take place on an on-going basis. The skills training would need to be worked out in more precise detail, based on an assessment of need and resources. However, the approach suggested should be as follows:

- (i) The statistical officer selected to participate in the CTRC Statistical Workshop in Guadeloupe in October should be attached for two (2) weeks at CTRC to work under the guidance of the Statistical Adviser. This period of attachment should co-incide with the processing and analysis at CTRC of the Visitor Expenditure and Motivational Survey which is to be conducted soon for Belize;
- (ii) The person selected as the marketing officer should spend one week at CTA's headquarters in New York learning about activities in the marketplace - this should preferably take place at the time of a CTA Chapter (trade fair) activity so that a feel for the interface with the travel trade is obtained. Following this is a brief (one week) attachment to a well-operated tourism marketing operation in another Caribbean country should be arranged - e.g. the Bahamas' Ministry of Tourism or the Cayman Islands' Department of Tourism. There the opportunity should be taken to see how market intelligence is obtained, research analysed and sales programmes developed.
- (iii) The research and planning officer selected should be attached to CTRC for about three weeks to become familiar with research and planning techniques and also to develop a systematic working relationship with CTRC in terms of tourism development support over the longer terms.

The above represents only the initial steps which need to be taken. The training at the organisational (policy) level will need to be on-going, hence the need to appoint an experienced tourism adviser from the start. The Belizean tourism director will of course be understudying the tourism adviser as the process evolves. Finally, even before any of the above commences, the Government should invite Mr. Eamonn Keane of the Pool of Marketing Specialists at CTRC to spend a day or two with senior policy makers in the Government, the airlines and the private sector, focusing on key issues involved in marketing Belize's tourism.

3.19 In terms of the second (skills) level of training the following is recommended :

- (i) A Tourism Awareness Programme aimed at sensitizing the people of Belize as to the economic importance of tourism and the vital role each one will be required to play as host to visitors. This awareness programme, which should be mounted with the assistance of CTRC, is crucial to the process of overcoming negative attitudes towards tourism and for creating an atmosphere conducive to visitors - word of mouth remains the most effective form of advertising. The awareness programme should include :
- a consciousness raising Tourism Awareness week, integrating radio and T.V. programmes, talk shows, school competitions, diving/and fishing competitions for visitors and cultural exhibitions and fairs.
 - specific sessions for front line personnel in tourism such as taxi drivers, customs and immigration officials, hotel front office personnel

and so on, targetted at attitudes;

- (ii) Short term training for hotel and restaurant workers to take the form of brief, specialized seminars on conduct, dress, attitude and service in general.

3.20 Once again it should be pointed out that the implementation of these recommendations do not in any way require significant budget outlays provided Belize is willing to seek and obtain the assistance of the regional tourism organizations - CTRC, CTA, the CHA and so on. Finally, the tourism adviser should initiate steps to ensure that the statistical officer who would have by then been trained in executing VEMS, undertakes these on an ongoing basis to ensure that visitors' views in respect of service and the nation's hosting of the visitor in general, are being monitored and are being used in respect of determining where things are going wrong and what additional training is required as time goes on.

Intersectoral Linkages

3.21 The maximization of inter-sectoral linkages (primarily with agriculture - so as to increase tourism's net contribution to the balance-of-payments - and handicraft development) is a longer term activity and should properly be placed within the context of the longer term operating framework. However, planning approaches to these issues should be commenced even in the immediate term and become part of the strategy for this period.

3.22 The research and statistical officers in tourism should begin liaising with the agricultural production statisticians and the hotel and restaurant operators in the private sector.

and agree on a methodology for obtaining data on agricultural produce used in food preparation. A comprehensive data base should be put together, having regard to any imported inputs used. This database could form the basis for future policy initiatives. With respect to handicraft, the findings of the initial CTRC mission under the EEC Regional Handicraft Development Project which, among other things, recommended that Belize could develop into a significant regional exporter (to replace Taiwan and Hong Kong in say, the Bahamas) should be carefully reviewed. Belize has been grouped with Jamaica and the Bahamas for Phase II of that project as well as the packaging/pricing and marketing of craft and should demonstrate much more enthusiasm in the project than previously obtained. A strong unit, such as the Office of Economic Development should be the liaison unit for CTRC in respect of that project.

- 3.23 The actions recommended form the basis of the short term strategy which the Government should consider implementing. Each set of activities depend to a large extent on prior action - they are in a sense sequential activities and can be implemented without great cost and within a realistic time frame.

4 Tourism Five Year Operating Framework

- 4.1 The five year operating framework presented here is intended to provide some general guidelines in respect of how the Government should approach tourism sectoral development over the medium to long term. A much more detailed plan would require substantially more in-depth work over a longer period of time since land-use and zoning issues, infrastructure and superstructure development, manpower planning and other resource allocation questions would need to be looked at and, carefully integrated. Lately, however, particularly in the Caribbean, there has been a shift away from tourism master plans (none of which ever gets implemented) towards flexible, indicative plans which more realistically address sectoral development in tourism. There is also a (highly desirable) bias towards ACTION in the proposals formulated here - an element usually missing in master plans.
- 4.2 The operating framework recommended for Belize is intended to build upon initiatives which would have been undertaken in the immediate to short term. It therefore assumes that some level of training, market interface and product development would have taken place and that that ground already covered would serve, in part, as the foundation for the sizeable task ahead. Also, commencement of implementation of the overall macro economic plan is assumed - one direct consequence of which is the way in which factor allocations (especially capital and labour) would need to be viewed. To attempt development of tourism outside of implementation of the overall macro economic plan is to court a situation of inconsistency among goals.

- 4.3 Finally, in this respect, pursuing the longer term plan is substantially more complex than short term strategy implementation and requires greater involvement by a number of public sector agencies. A public sector co-ordinating committee which could serve as a "cleaning house" for various proposals and tasks and through which effective coordination of those tasks can be effected, should be established by the Government.

The Framework

Task One: Assessing the Tourism Capability

- 4.4 The first task to be performed involves an objective assessment of the tourism supply or tourism capability. This is a necessary precursor to determining the real as well as the potential sustainable demand for the Belize tourism product over the longer term. This assessment will also assist in the minimization of risks associated with tourism investment decision making. Under normal circumstances this would be a highly complex and time consuming process. However, the task has been to some extent, simplified in Belize because experts have previously identified the greatest potential to lie in the coastal and marine areas, the forests and the Southern mountains. With these as the target areas, the process - though hampered by the lack of data at this point in time - could continue as set out below.
- 4.5 The following logic steps are recommended to enable completion of task one :

- (i) the tourism unit or department should follow-through quickly on the assessment of the product which will be presented by Steingenberger Consulting. That assessment suggests that specific cataloging of tourism assets particularly in the Southern mountains and the wildlife areas be undertaken. This writer suggests aggressive movement on the coastal and marine tourism areas, even while the assessment of the other type of tourism offer is being undertaken;
- (ii) the tourism unit should on the basis of the assessment of the separate components of the product, produce information on
- present levels of utilization of each component (e.g. how many people use each beach or other tourism amenity)
 - visitors views on the attributes and drawbacks of present utilization;
 - what specific improvements are desirable;
 - what increases in utilization (i.e. how many more people can use each amenity) can be accommodated given present capacities;
 - what overall increases (in total amenities) can be accommodated given existing infrastructure
- (iii) the tourism unit should prepare a profile for each tourism region (the present Belize districts might be "regions") which would detail the information above and where necessary additional details such as accommodation, transport to/from/within, services available such as banking, telephone, telex, climatic conditions including rainfall and temperature, fishing seasons and so on. Each regional profile should be brief but highly factual.

It should be noted that in the execution of these logic steps some notions about actual levels of tourists which can be served satisfactorily at varying levels of infrastructural and superstructural development will be obtained.

Task Two: Assessing Demand

4.6 Assessing the demand for the product components should be the ensuing task. The tourism unit or department should, with the assistance of marketing experts, undertake a detailed assessment of the strengths and weaknesses of each tourism capacity profile obtained in task one. The following steps are recommended :

- (i) An assessment of market information already existing for the type of tourism product which can be formulated in Belize;
- (ii) Identification of a reputable market research entity or mechanism which can provide market intelligence in respect of the general Belize tourism product (some indication as to how this should be approached has already been presented in the short-term strategy);
- (iii) Segmentation of the markets which are the best "targets of opportunity" for the national product (a footnote concerning this comes at the end of this paragraph);
- (iv) Quantification and qualification of the target market, an assessment of current and emerging trends therein against the background of the existing Belize product;
- (v) Determination of the size of market share which will be pursued within specific time horizons;

- (vi) Discussion and cross check of findings and tactical approaches with key suppliers in the industry - this would involve select tour operators (partly identified in earlier activities) wholesalers, travel agents, and market analysts such as at CTA New York;
- (vii) Discussion of findings and strategic approaches with local private sector involved in tourism.

Even at this early stage, this writer would like to suggest Belize's initial demand activity should focus on special interest markets (diving, deep sea fishing, hiking, canoeing and horseback riding) stratified from the middle to upper income levels. The mass market (beach and social pollution types) which is essentially low budget should be avoided particularly because of low revenue per head. Recent market research shows that the 13 Western States of the United States referred to earlier have populations which are high income, highly mobile and most adventurous i.e. a sound market in which to launch an assault. Second and third stage demand activity might focus on other special interest groups such as scientists, historians, audubon societies and so on, as well as the cruise ship market.

Task Three : (A) Formulating the Product

- 4.7 Having assessed capacity and demand, the Government would in fact have preliminarily identified gaps in the tourism product. This phase of the tourism development programme will enable the country to concentrate on formulating the product including attending to the capability gaps. By quantifying demand, the Government would then be in a

position to decide, for example, the extent to which ethnic cultural presentation should form part of the product. The tourism authority should then :

- (i) determine the incremental entertainment activity and accommodation requirements;
- (ii) determine the incremental infrastructural requirements e.g. can the existing water, power, sewerage and communication facilities accept additional load or is additional plant/capacity needed;
- (iii) address the issue of identification of financial resources for infrastructure;
- (iv) determine and introduce the types of incentives which are necessary to stimulate Belizean private sector participation in closing the tourism capacity gap (e.g. tax incentives, long-term leases);
- (v) design and implement a training and human resource development programme for people who can be absorbed in the tourism industry (this will require very careful thought so as not to interfere with the agricultural sector plan by drawing away employees from that sector);
- (vi) commence the process of specifying or encouraging the specification of various "packages" - components of the Belize vacation which will be marketed in the target markets.

- 4.8 No mention is made here of two additional infrastructural requirements which will need to be addressed - the airport and cruiseship facilities. The airport is being addressed separately at the time of writing and may well be completed in advance of the tourism sectoral activity one to two years hence. Incentives in the cruiseship area such as rehabilitation of the cruiseship facilities should be undertaken only if specific interests of cruise operators can be determined and quantified.
- 4.9 Peripheral aspects of the tourism product formulation process such as handicraft development and marketing, are expected to be sufficiently advanced - from within the short-term programme - as to warrant integration into the overall product offer.
- 4.10 Finally, on product formulation, it is felt that development and presentation of one or two Mayan sites is so specialized that it should be dealt with solely within the Department of Archaeology. In fact, that department is currently preparing for the Government, a priority list of sites which should be consolidated, with costs. Consideration of economic merits of such efforts should, however, bear in mind the assessment of tourism demand which would have emerged in Task Two along with the resulting revenues (for visitation to the sites, transportation thereto and so on).

Task Three : (B) Marketing the Product

- 4.11 To cut down what is already turning out to be a paper lengthier than was planned and requested, only a brief insight will be presented into the marketing of the product particularly since this has been dealt with substantially along the way and will also depend in large measure on

resources available and conditions prevailing at the time. The key challenge will remain creating the special and unique image of the Belize tourism experience alluded to in the short term strategy. The market segmentation which results from the on-going research carried out by the tourism administration, and in particular its assessment of demand, will be key determinants of the highly targetted markets suggested. Finally, this writer would delay promotional activities in Europe unless substantially changed circumstances to the present emerge.

Concluding Remarks

- 4.12 What has been presented is an operating framework with sequencing of activities intended to guide the Government's lead role in the developing of tourism over the next few years. The process will be a long and complex one requiring action and commitment on several fronts. Confidence and involvement on the part of the private sector is a sine qua non for success as is the need for the Government to put the tourism administration recommended in place and initiate a programme of on-going research at the very earliest opportunity. Further and more specific activities can then be detailed as various aspects become more crystallised

5 Evaluation of Costs and Duration of Alternative Tourism Development over the Period 1985 - 1989

5.1 This section of the paper has been prepared in fulfilment of (B) in the T.O.R. For reasons already embellished in the preceding sections of the paper it was not considered appropriate to prepare specific alternative development programmes for Belize at this time. Instead, strategic approaches as well as an overall framework delineating critical paths to possible tourism (sectoral) development. Movement along those paths will in turn generate ensuing alternatives which in turn will make costing feasible and allow benefit cost analysis to be undertaken.

5.2 The basic thrust throughout, however, is for small initiatives to be pursued in small portions, taking full account of resource availability and the country's absorptive capacity. This, in a sense narrows the range of alternatives and enables some fell for costs and duration to be developed. For example, mass market tourism requiring substantial airport facilities for jumbo jets, significant beach front development (large hotels) and possible destruction and social pollution is clearly a non-option. Accordingly, a few general examples in this regard are presented below.

5.3 (i) Alternatives in the Short Term

Objectives: To increase occupancy levels in the marine resource areas and to increase expenditure per visitor at the least possible cost (no addition to accommodation plant).

Action required: Suitable packaging and marketing of short-stay marine/water-based tourism packages in respect of the Cayes and Placentia. Discussions with tour operators and segmentation of market.

Preparation of marketing tools e.g. good color brochure and exposure through industry publications. Also high profile focal activities (e.g. sailing week) for impact in the market segment.

Duration: 6 months - 1 year

Cost: Approximately

- familiarization trip for tour operators
- advertising costs (brochures etc.)
- promotional activities e.g. sailing week

5.4 (ii) Alternative over the longer term

Objectives: To double number of arrivals and expenditure levels in the special interest markets (e.g. scuba diving combined with hiking and inland expeditions - 7 day stay).

Action required:

- Expand existing capacity in accommodation
- Increase infrastructural capacity in various locations
- Provide additional amenities (e.g. boats, instructors, safety manuals, canoes, hiking trails and guides
- Package and cost components for the vacation
- Develop a marketing tool for the vacation with a tour operator, airline or so
- Promote the new product in viable market segment

Duration: 1 - 2 years

Cost: Substantial but dependent on

- tour operators chosen
- level of infrastructure improvement/
expansion needed
- cost of incremental amenities
- cost of marketing medium
- etc. etc.

5.5 The whole idea is that under the present circumstances costing the alternatives should await the completion of prior action such as the determination of those alternatives which are feasible, given the initial market intelligence and global resources. Within that, the approach will still have to be that of matching alternatives (based on demand) to resources available. These ideas can be discussed in greater detail as the Government deems necessary.

6 Forseeable Impact of Touristic Development During the
 Period 1985 - 1989

- 6.1 Background - This section of the terms of reference requires that the foreseeable impact of touristic development during the plan period be determined. The present circumstances as has been pointed out before, are not conducive to a five year tourism plan as such - there are still too many gaps in data and other vital information. The five year operating framework instead allows for a logical sequencing of planning and implementing activities. On this basis, the necessary benefit/cost analysis can be conducted in manageable modules and progress can be measurable cumulatively as against the quantifiable objectives.
- 6.2 The planning/operating framework however does not allow specific forecasts to be made in respect of (economic) impacts, particularly when, as is the case in Belize, initial economic impact data is scarce - neither estimates of tourism expenditure nor direct tourism employment are available. Nevertheless, for purposes of this exercise, guarded but reasonable forecasts of potential impact are presented.
- 6.3 Impacts - The most important economic effects in tourism arise from the expenditure of tourists. This expenditure:
- (i) provides income for direct recipients
 - (ii) provides employment (direct and indirect)
 - (iii) contributes to foreign exchange earnings
 - (iv) contributes to Government revenue

These impacts are diffused throughout the economy when maximum encouragement is received and the Tourism Tree at Appendix 2 gives an indication of how this can take place. Each of these main impact areas is dealt with in turn below. The comments bear in mind the Government's commitment to resolving the fiscal crisis, avoiding a balance of payments crisis and raising the standard of living of all Belizeans as expressed in the draft macro economic plan.

6.4 To simplify matters, a hypothetical scenario merits consideration, a scenario which the Government can influence as the process evolves. That is the "hub and spoke" scenario, where certain sites are designated as the "hub" of tourism activity from which tourism is dispersed to the environs or "spokes". Examples of this would be Ambergris Caye serving as a hub for water and beach activities which then take place all along the barrier reef as well as night-time activity entertainment in Belize City or alternative San Ignacio as a hub with hinterland tourism activity stretching to Benque Viejo and even San Antonio. First and second round economic impacts will occur as more Belizeans are encouraged to participate in the product offer along the spokes.

6.5 Although the actual formulation of the product must await the completion of the tasks in the operating framework, consideration of some likely tourism packages will help clarify likely impacts :

(i) In the Immediate to Short Term

(a) 4 day/3 night package ex Los Angeles

- activity: exclusively scuba diving
- beneficiary: Government (tax) hotelier, dive operator

(b) 3 nights/4 days ex Los Angeles

- activity: diving, fishing, sailing
- beneficiary: Government (tax); dive operator; hotelier; fishing boat operator, boat charter operator, hotelier

(c) 7 nights/6 days ex Los Angeles

- activity: diving, water sports, inland expedition (canoeing, hiking)
- beneficiaries: dive operators, water sports operators (skiing, windsurfing), expedition operators and tour guides, hoteliers

(ii) In the Medium-Longer Term

(a) 9-12 days (average U.S. visitors length of stay)

- activities: diving, water sports, inland expedition (canoeing, hiking) ruins, historical sites, cultural presentation, ethnic village life participation etc.
- beneficiaries: as above plus local cultural activists

(b) cruiseship arrivals

- activities: shopping, day tour to certain hinterland sites
- beneficiaries: craft people, local transport operators/tour guides, Government (taxes)

(c) Casinos

- beneficiaries: Government, employees

6.6 The above is purely an indicative illustration of first round beneficiaries and assumes the obvious with respect to airlines, ground/inland transportation operators and so on, benefitting in the very first round. In the final analysis, the actual projection of (economic) impacts of tourism depends on the aforementioned visitor expenditure survey as well as the information which flows from a thorough knowledge of markets and determinants of demand (the tasks adumbrated in the frameworks are intended to yield this for Belize). From these ultimately flow, in turn, the projections or forecasts of investment in hotels, guest houses and tourist facilities.

6.7 The foreseeable impacts for Belize then are likely to be as follows (examples):

(i) Income for Direct Recipients

- (a) hoteliers, guest houses
- (b) restaurant and entertainment operators
- (c) water sports operators, expedition/tour operators
- (d) taxi drivers, ground transport operators
- (e) craft shop operators

(ii) Employment - Direct and Indirect (GDP contribution)

- (a) hotel workers, cooks, restaurant workers
- (b) dive instructors, charter crew members, tour guides
- (c) bus and van drivers, airline personnel
- (d) craft people, jewelers
- (e) farmers, food and beverage workers, distributors
- (f) promotion and advertising personnel
- (g) construction and maintenance workers, garage service people
- (h) investment, banking personnel
- (i) laundry personnel, doctors, vehicles and so on

(iii) Foreign Exchange Earnings (Export Tourism)

- (a) prepaid expenses remitted by foreign tour operators;
- (b) in-country expenditure by visitors

(iv) Government Revenue

- (a) port departure taxes
- (b) occupancy taxes
- (c) food, beverage taxes
- (d) establishment taxes
- (e) import duties from tourism-induced imports
- (f) landing, berthing taxes

As the base i.e. the contribution presently made by tourism - becomes available through the visitor spending and the establishments surveys, the projections on impacts can then be undertaken.

6.8 A hypothetical situation for 1985 - 1989 would be:

SHORT TERM

An increase in stay over visitors 1,000 per annum to 5,000 by 1989 then this could result in

(i) 1985-1987

- (a) Government revenue (per annum)
 - . departure taxes = \$10.00 x 1,000 = \$10,000
 - . occupancy taxes = \$ 5.00 per b/n x 7,000*
= \$35,000

* average length of stay 7 nights

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- . food and beverage taxes =
- . import duties =
- . employment taxes =

(b) Employment

- . increase in airport staff, hotel and restaurant workers
- . increase in ground operators

(c) Income

- . income for hotel, restaurant and transport workers
- . dive/marine/beach operators
- . Government (indirect)

(d) Foreign Exchange

- . cruiseship visitors at \$20 per visitor
- . banks - Central Bank

(ii) 1987-1989

All of the above plus construction workers, lending institutions, developers e.g. craft market, dockside dining and recreational facilities, local canoe builders, blacksmiths, ranchers and so on.

6.9 The following points merit bearing in mind as efforts to measure the economic impact of tourism through the plan period:

- (i) Base data from the initial visitor expenditure survey are key to measurement of impact;

- (ii) This base data will need careful organization and categorization along specific lines such as :
- expenditure categories e.g. accommodation, meals, gratuities, local transportation etc.;
 - stopover visitor expenditure per visit;
 - cruiseship visitor expenditure per visit;
 - household incomes, customs revenue, imports associated with visits;
- (iii) Government revenue data should be collected and analyzed by detailed disaggregation;
- (iv) Establishment data on actual employment should be collected (a recent employment survey does not offer a sectoral employment situation report for tourism)
- (v) Established tourism multipliers including the standard Keynesian multiplier $k = \frac{1}{mps+mpm}$ should be applied to the base data to measure feed-through effects on the economy (several methods exist for measuring the amount of income which is generated by a dollar of tourism expenditure and more specifically the amount of income which would be generated by an additional dollar of tourism expenditure - these are however largely functional only when good data exists);
- (vi) The information will have to be collected systematically in order to allow a data series to be put together and thus for forecasting and monitoring to be carried out;

- (vii) To assist in channelling maximal economic impact within the Belize economy, ownership should be Belizean - suggesting small-medium size accommodation establishments and outdoor amenities. These however (smaller accommodation) limit employment impact, particularly if they are owner-operated, but this may be compensated for by higher domestic savings;
- (viii) The net export or balance-of-payments contribution of tourism will be greater if the secondary sectors like agriculture and handicraft (including raw materials, straw and wooden furniture, books etc.) are directly linked than if they are not. This must be borne in mind when applications for expatriate concessions are being considered, when import policies are being decided and when infrastructure for the movement of produce is being designed.

6.10 Finally a word on economic impact in a scenario involving casinos. It is true that casinos breed other ills - prostitution and drugs among the most noteworthy, although there is yet to be specific evidence of the latter. It is also true that casinos are hard to "control" in the sense of the Government being able to exercise what takes place within casinos. Yet, to the extent that casinos

- (i) can be isolated from the local populace i.e. placed in remote enclave areas away from cities and towns but within easy access of cruiseship visitors and visitors arriving by air;

THE FIVE YEAR OPERATING FRAMEWORK presents:

- (i) A Basic Framework Within Which the Government Could Foster the Development of Tourism;
- (ii) A Sequence of Activities (Tasks) Intended to Assist In the Determination of the Type of Tourism Appropriate For Belize;
- (iii) A Means of Operating With Limited Expertise and Resources And With Minimum Risk To Public Sector Finances

THE SHORT TERM STRATEGY deals with :

- (i) Institutional Arrangements: a new tourism authority
- (ii) Formulation/Development of the tourism product
- (iii) Marketing and Promotion of the product
- (iv) Attending to training and other manpower needs

Key: Budgetary and other resource constraints yet -
rapid action to increase earnings

- 40 -

SECTORAL DEVELOPMENT FRAMEWORK
MEDIUM - LONGER TERM APPROACH

Project/Studies	Specific Objectives	Possible Donor	Suggested Date
12. Assessment of existing infrastructural capacity (water sewerage, electricity communications) at the Cayes Belize City, Belmopan, San - Ignacio, Dangriga, Placentia	To ascertain precise parameters of existing infrastructure and to determine requirements in respect of additional accomodation and tourism amenities prior to further initiatives icw tourism planning	B.D.D. or C.I.D.A.	Early 1986
13. Identification of specific resources in the macroeconomic framework available for tourism development over the period 1985-1989 - fiscal - manpower	To identify the financing gap and resource shortfall; to allow the Tourism Authority to design a programme which fits its resource flows and to firm up its training programme		Mid 1986
14. Selection and upgrading of one or two Mayan sites for offer as a <u>tourism</u> attraction (excavation consolidation and restoration)	To enhance the tourism product (attractions offer) to the level of other competing destinations	EEC - financing Mexico - expertise	Early 1987
15. Development of hiking trails x to specified inland locations including locating, cutting and signposting as well as rest facilities.	To diversify the tourism product for strategic marketing (segmentation)	U.S. Park Service through USAID	Early 1987
16. To survey and catalogue the inland tourism attractions including caves, bridges, flora, canoeing and fishing potential	As a continuing process, the formulation of a diversified product and the determination of a conservation programme in this regard	EEC - US. AID	Mid - 1987

e.g. the trail from Augustin in Cayo to the new Mayan site at Caracol combined with a return trip canoeing down river to the Falls at Rio On, a visit to nearby caves and a stay at the Blancaneaux Lodge might provide an interesting marketing opportunity.

Project/ Studies	Specific Objectives	Possible Donors	Suggested Dates
17. Design of a tourism marketing and promotion programme	Marketing of Belize as a unique tourism experience in appropriate markets	EEC, CTA	Late 1987

The following points should be noted:

- (i) The Studies / Project at 14 - 17 will depend largely on the outcome of the market intelligence undertaken in the short-term;;
- (ii) The EEC has agreed under Lome III to fund restoration of historic monuments, sites and so on.

SECTORAL DEVELOPMENT FRAMEWORK
MEDIUM - LONGER TERM APPROACH

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e.g. the trail from Augustin in Cayo to the new Mayan site at Caracol combined with a return trip canoeing down river to the Falls at Rio On, a visit to nearby caves and a stay at the Blancaneaux Lodge might provide an interesting marketing opportunity.

Project	Specific Objectives	Possible Donors	Suggested Timing
9. Skills training in techniques and export marketing of handicraft - appointment of qualified coordinator to liaise with regional project	To promote handicraft development as an integral part of the tourism handicraft project product	CTRC Regional	Immediate 1985
10. To assist in meeting local costs for participation in regional handicraft project at 9. above	- as above -	EEC	Immediate (1985)
10. Assessment and quantification of agricultural products used in tourism industry (hotels)	To maximize intersectoral links between tourism and agriculture	USAID	Mid 1986
11. Examination of potential for greater use of local agricultural inputs	Establishment of a systematic approach for monitoring agricultural tourism linkages	USAID/CDB	Late 1986

STRATEGY IMPLEMENTATION
IMMEDIATE - SHORT-TERM

Project	Specific Objectives	Possible Donors	Suggested Timing
(e) Tourism Awareness Programme for Belize	Sensitizing the population about the importance of tourism and their role in its development	CIDA/CTRC	Early 1986
(f) Attitudinal training for front line personnel in hotels, taxi, drivers, customs and immigration	To develop the service end of the tourism product and commence creation of special image	CTRC, CHA Barbados Govt. USAID	Mid - 1986
3. Preparation and Publication of a scuba diving standards manual	To use as a selling tool for potential divers to Belize	CTA/CTRC	Early (1986)
4. Programme of on-lending including incentives for upgrading of accomodation facilities in the Cayes	To assist in formulation and marketing of the products by tour operators	DFC/Tourism Investment Unit coordinated through Office of Economic Development	As soon as possible (1985)
5. Signposting of the Mayan sites at Altun Ha and Xunantunich	- as above -	British Army in Belize	Immediately
6. Familiarization trips for tour operators to Belize	Market intelligence with respect to formulation of the product and to push expanded occupancy levels at the Cayes	Airlines operating in Belize; Govt. to meet on-ground costs	Early 1986
7. Establishment of promotional library, including brochures film on Belize by photojournalist	To use in the promotion and marketing of as a special interest destination with emphasis on the marine activities (the Cayes)	CTC Europe; LEC	Mid 1986
8. Participation in Tourism Trade Fairs	To create an awareness of the Belize product in select markets	EEC; CTA	Late 1985, Early 1986

STRATEGY IMPLEMENTATION
IMMEDIATE - SHORT TERM

<u>Project</u>	<u>Specific Objectives</u>	<u>Possible Donor</u>	<u>Suggested Timing</u>
1. Technical Assistance in the reorganisation of the Belize Tourism Authority	Strengthening of the Government's tourism function to facilitate the implementation of tourism development plans	EEC	Immediate
b. Appointment of a Tourism Advisor	- do -	CTRC	Immediate
2. <u>Training</u>			
(a) Short term attachment of Statistical Officer to CTRC	Training and development in key tourism statistical functions	CTRC	November-December 1985
(b) Short term attachment of marketing officer to CTA	Marketplace interface and familiarization with travel trade	CTA	March (1986)
(c) Short term attachment of research officer to CTRC	Sources and methods of up to date research	CTRC / UNDP	January 1986 (coincide with preparation of CTRC work programme)
(d) Mr. E. Keane PMS to hold high level tourism assessment and marketing seminar for Belize administration	To inform about alternative strategies in marketing for the immediate to short-term	PMS - CTRC	February 1986

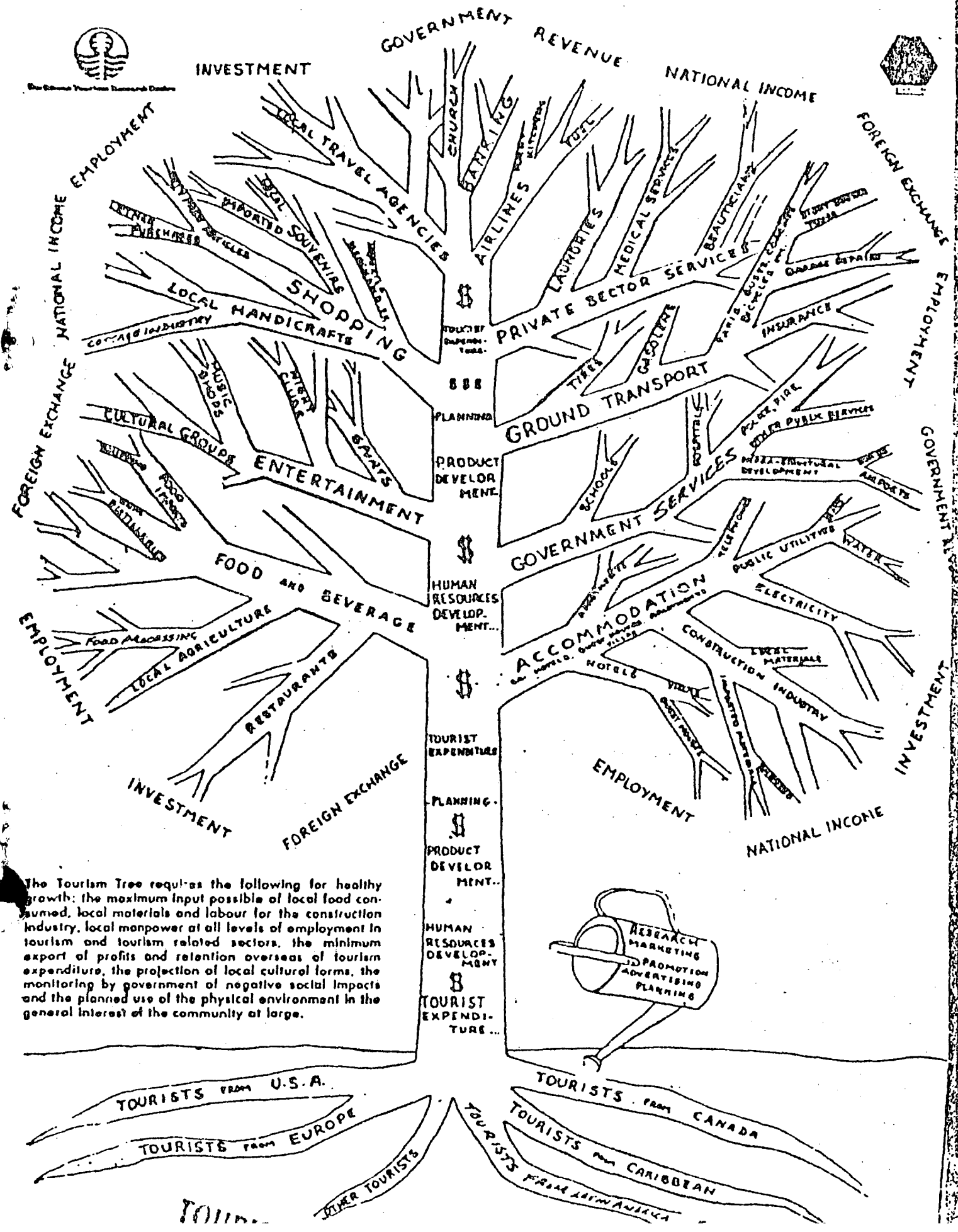
APPENDIX I

BELIZE TOURISM DEVELOPMENT

TERMS OF REFERENCE: P. ALEXANDER

- A) PREPARATION OF A 5 YEAR PLAN FRAMEWORK FOR TOURISM SECTOR TO INCLUDE A 1-2 YR STRATEGY - ACTION PLAN
- B) ESTIMATE OF COSTS AND DURATION OF ALTERNATIVE DEVELOPMENT OF TOURISM FOR 1985-89.
- C) DETERMINE FORSEEABLE IMPACT OF TOURISTIC DEVELOPMENT OF BELIZE ECONOMY DURING PLAN PERIOD.
- D) PREPARE LISTING OF STUDIES OF PREINVESTMENT AND PROJECTS OF TOURISTIC DEVELOPMENT IN LINE WITH GLOBAL PLAN OF DEVELOPMENT OBJECTIVES.

THE TOURISM TREE



The Tourism Tree requires the following for healthy growth: the maximum input possible of local food consumed, local materials and labour for the construction industry, local manpower at all levels of employment in tourism and tourism related sectors, the minimum export of profits and retention overseas of tourism expenditure, the protection of local cultural forms, the monitoring by government of negative social impacts and the planned use of the physical environment in the general interest of the community at large.

